

FIG. 2A

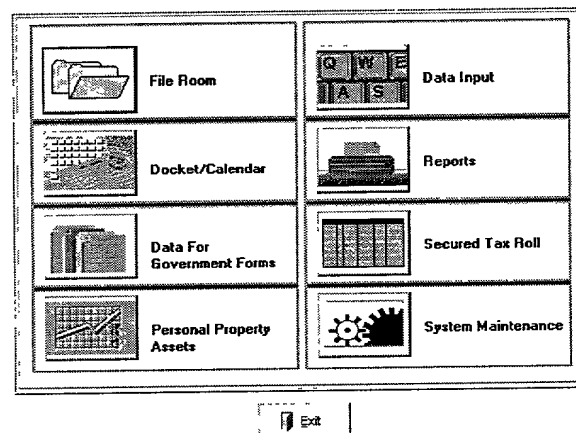


FIG. 2B Main Window

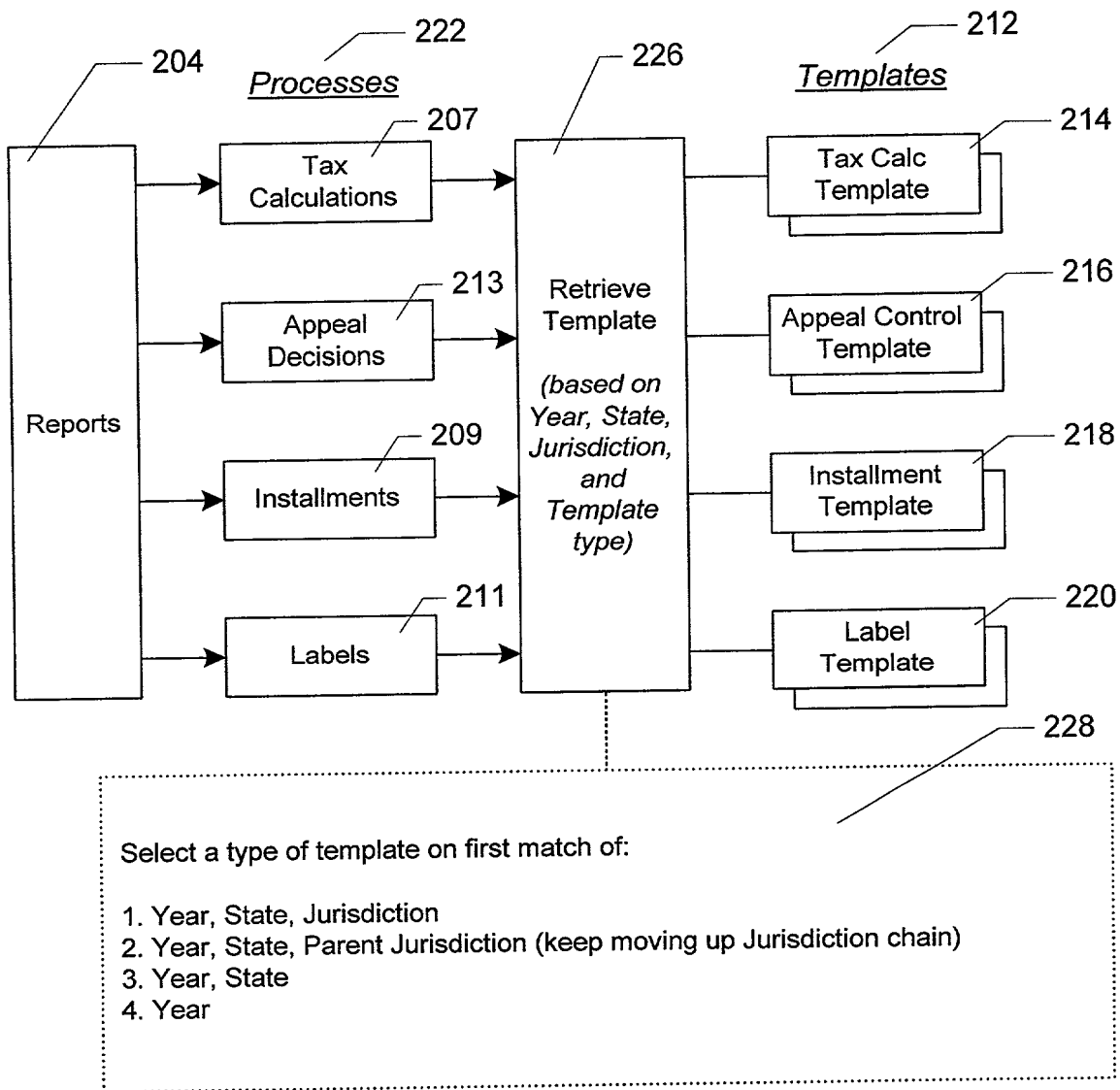


FIG. 3

232 234 254 258 262 264 272

406 236 238 240 242 244 246 248 250 230

Property Maintenance

Other Edit Navigation Save Property Assessment Info Districts Appeals Appeal Process Subpageable Budgets Accounts Payable

Year: 1997 State: AZ Juris Code: MAR Maricopa Client: ? Default Settings

General

Year: 1997 State: AZ Juris Code: MAR Client ID: ? Appeal Juris: ?

Parcel: ? Owner: ? Region: ?

Prop Name: ? City: ? Zip Code: ?

Address: ? Prop ID: ? Vol: ? Prop Cd: ? Use Cd: ?

Valuation

Rate Year: 1997 Val Year: 1996 Rev Cycle: 2

Unit: 1 Zoning: ?

Appraisal: ? Appraisal Date: ?

Owner's Opinion: ? Owner's Opinion Date: ?

Purchase: ? Purchase Date: ?

Prior Purchase \$: ? Prior Purchase Date: ?

Transfer Tax: ? Last Rehab Date: ?

Escrow: ? Contracted For Sale: ?

Data Closed: ? Scheduled Closing: ?

Sale Price: ? Disposal Date: ? Sale Date: ?

Land

Land: Acres Sq Ft

Land Size: 0.000

Improvements

Yr Blt: ? Age: 0 % Comp: 100.0

Imp (Sq Ft): 0

GLA (Sq Ft): 0

Base Value

Base Year: 0000 % Increase: 0.0000

Base Value: 0.00

Notes

Go To Parent Show Templates

Tax Calculation

Combination: ?

Individual: ?

256 260 266 268 270 274 276 278

FIG. 4 Parcel Record

280

Calculate Tax On These Jurisdictions

MAR

Add-->

--Remove

All -->

--None

Individual (Current Property Only)

Combined (Include Subproperties)

Both

OK Cancel ? Help

282

FIG. 5 Calculate Tax

284

282

752

288

754

286

Assessment Track

Type: ☒ RE ☐ FP ☐ SUP ☐ NAV

Track ID: 1

Tax Bill: N25

Tax Bill Amt: 0.00

☒ Plug Tax Rate ☐ Projected

FCV Rate: 0.100000

LPV Rate: 0.052680

Eq Ratio: 1.00000

☐ This is a Photata Track

This track supercedes:

Un:

Descr:

☒ Include Assessment

Assessment Detail

Subtype	FCV	Asd FCV	FCV Imp	FCV Land	Calc Tax Amount
Interim	900,000	720,000	400,000	500,000	109,929.60

Change Order: Move Up Move Down

Projected values are marked with an asterisk (*)

Subtype: Interim Class: 5 ☐ Protected?

Actual Value		Land		Improvements	
FCV:	900,000		500,000	400,000	FCV Ratio: 80.000000
Asd FCV	720,000		400,000	320,000	FCV Imp Ratio: ?
LPV:	900,000		Asd LPV:	720,000	LPV Ratio: 80.000000

FIG. 6 Assessments

292

290

Districts

Juns Cd	Dist Code	Description
MAR	031600	Light Industrial

Taxing Jurisdiction: MAR

Dist Code: 031600

Class: 8

FCV Rate: 0.037028

LPV Rate: 0.102171

Rate Year: 1997

☐ Special District

Type: ~

Amount: ?

FIG. 7 Districts

296 298 284 294

300

Appeal Billing

Select a Track and/or Appeal:

Type	Track ID	Prorata	ECA	Appeal Reference
PERPRDP	PP1	No		
A REAL	1	No	No	

A Tracks With Appeal Activity

Appeal Record

Appeal #: File #: Billing#: Date Created: 12/28/98

Appeal Ref: Complainant:

Appeal Type: ☒ Standard Appeal ☐ Error Correction Appeal Override standard appeal at: Level: 0 Hearing: 0

Appeal Reasons: Status:

Responsible Professional: ☒ Allocated?

Working Professional: ☐ Consultant Engaged

Consultant:

Appellant Code: ? Appellant Other Info:

Appeal Code: ? Appeal Other Info:

Refund Expected: ? Refund Received: ? Tax Credit: ?

Notes:

FIG. 8 Appeal Record

296 298 302

304

Appeal Billing

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

Billing Information

Fee Agreement #1			Fee Agreement #2			Fee Agreement #3		
Billing Type	Terms	Final Amount	Terms	Final Amount	Terms	Final Amount	Terms	Final Amount
Contingency	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
Flat	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Hourly	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Form:			Form:		Form:			

☐ Multiple Years Final Year:

Referral

Firm: Contact:

☒ Contingency ☐ Flat Fee Amount:

FIG. 9 Appeal Billing

306

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

Level	Hearing	Tax Amount	1,000.00	Appeal Level	1	Hearing	1
1	1	Calc Tax Amount	?	Appeal #	3001	Class	9

☒ File Appeal
☐ Litigation

☐ Outside Appeal
☐ Skip Level

	Requested	Actual Value	Land	Improvements	Date	Time
Requested FCV	9,000	90,000	20,000	70,000	Filing Deadline	12/01/97 12:00 PM
Requested Asd FCV	900	90,000	20,000	70,000	Date Filed	11/30/97 09:00 AM
FCV Ratio	10.00000000	100.00000000		FCV Imp Ratio	Hearing	01/20/97 02:00 PM
Requested LPV	8,000	89,000		Requested LPV Ratio	Decision	02/19/98 04:00 AM
Requested Asd LPV	7,920	89,000		Actual LPV Ratio		

FIG. 10 Appeal Process

307

Parcel	Property Name	Notes
000-00-0002	First Sub Parcel	
000-00-0003	Second Sub Parcel	
000-00-0004	Third Sub Parcel	
000-00-0005	Fourth Sub Parcel	absoligig
000-00-0006	Pati's Property	Just a really big property.

Switch To Subparcel..

Parcel: --

FIG. 11 Subparcels

Budget Name: **Default**

NAV Only	no
Personal Only	no
Real Only	yes
Sup Only	no

Date Saved: _____ Time Saved: 4:54 pm

Saved By: _____ ☐ Combined Property

Annual Increase Rates

FCV Increase: 0.00000 FCV Rate Increase: 0.00000

LPV Increase: 0.00000 LPV Rate Increase: 0.00000

Other Parameters

Years To Forecast: 10 ☐ Entire Property

Equalization Ratio: 1.00000 ☐ Track Installments

Budget On This Track Type

☐ Real ☐ Personal ☐ Supplemental ☒ NAV

Notes:

Create new budget parameters or edit existing ones. When you're ready, press 'Open Budget' to go into the budget worksheet.

Open Budget

Select Default Budget

Combine Budgets

FIG. 12 Create Budgets

Budget Worksheet for Scot Test

Property Year: 1997 State: AZ Juris Cdt: Mar Parcel: 222-22-222A

Prop Name: Parker Residence Prop ID: _____

Budget Name: Scot Test ☒ Real ☐ Personal ☐ Supplemental

TV Increase: 0.02000 OV Increase: 0.00000 Years To Forecast: 10

TV Rate Increase: 0.02000 OV Rate Increase: 0.00000 ☐ Combined Budget

Year	TV	TV Tax Rate	TV Ratio	OV	OV Tax Rate	OV Ratio	Tax
1997	100,000	0.030000	0.0000	200,000	0.000000	10.0000	300.00
1998	102,000	0.030600	0.0000	200,000	0.000000	10.0000	0.00
1999	104,040	0.031212	0.0000	200,000	0.000000	10.0000	0.00
2000	106,121	0.031836	0.0000	200,000	0.000000	10.0000	0.00
2001	108,243	0.032473	0.0000	200,000	0.000000	10.0000	0.00
2002	110,408	0.033122	0.0000	200,000	0.000000	10.0000	0.00
2003	112,616	0.033789	0.0000	200,000	0.000000	10.0000	0.00
2004	114,863	0.034461	0.0000	200,000	0.000000	10.0000	0.00
2005	117,166	0.035150	0.0000	200,000	0.000000	10.0000	0.00
2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00

Budget Status: This budget is saved.

Tax Year	Installment	Tax	Date Due	Total Payment
1997	1	150.00	11/03/1997	150.00
1997	2	150.00	05/01/1998	300.00

Show

☒ Tax From 1997 ☐ Installments Due in 1997

Save Budget

Recalculate Budget

Restore to Last Saved

Start Over

Exit

FIG. 13 Budget Worksheet

348

Item	Required Date	Payee	Asmt Type	Track ID	Tax Bill#	Total Due	Disc Amount	Total Payments	Payment Date
1	07/01/97	AZ-MARICOPA-T-PERPROP	PP1		PP36163135165165	25,000.00	0.00	25,000.00	07/01/97
1	11/03/97	AZ-MARICOPA-T-REAL	1		N25	52,964.80	0.00	52,964.80	07/01/97
2	05/01/98	AZ-MARICOPA-T-REAL	1		N25	52,964.80	0.00	52,964.80	05/01/98

Asmt Types	<input checked="" type="radio"/> Real	<input type="radio"/> Supplemental	<input type="radio"/> Personal Property	<input type="radio"/> NAV	Track ID: 1	Chrg Less Disc	130,929.60
Installment:	0	<input type="checkbox"/> Estimate?	Payee:	AZ-MARICOPA-T		Payments:	130,929.60
Tax Bill#	?	Chk Req #	0	Check Num	0	Balance to Pay:	0.00
						Unpaid Amt:	0.00
		Charges	Discount	Payments			
Date:							
Principal:		0.00	0.00	0.00	Status	Released	
Penalty:		0.00		0.00	Auto Add		
Interest:		0.00		0.00	Entry Date		
Notes Other:		0.00		0.00	Mailed Date:		

350

FIG. 14 Accounts Payable

352

Auto Add

A/P Entries

☒ Divide into Installments
 ☒ Include Discounts
 ☒ Include Payments
 ☐ Skip Tracks Already Brought Over

Track Types

☒ Real
 ☐ Supplemental
 ☒ Personal
 ☐ NAV

This procedure will automatically create A/P records. Payees must be setup for the jurisdiction. Also, the installment rules must be set up for this jurisdiction.

This jurisdiction is getting its rules from:

Arizona (Real)
 Arizona (Personal)

OK

Cancel

FIG. 15 Auto Add

Client ID	Name	Active?
2602	HUNTER'S GLEN APARTMENTS	Y
2603	LIBERTY II LP	Y
2604	FIRST UNION REAL ESTATE EQUITY	Y
2605	RON SHOFFET	Y
2606	BANK ONE CHICAGO	Y
3040	3040 North 44th Street Partners	Y
777INVE	777 Investments LLC	Y
9998	Ashley Eleanor Merritt	Y

Client ID: 1001

Client ID: 9998 Client Name: Ashley Eleanor Merritt Client #: 9998 Billing #: 9998 Contacts

Type: Client SubType: Current Responsible Attorney: Rich J. Truly

Address: 8000 N. Barney Lane Notes:

Mailing Address: P. O. Box 7

City: Phoenix State: AZ Zip: 85020

E-Mail Address: ashley@naccarali.com

Phone: 602-900-9998 Extension: Active: Y

Fax: 602-900-9997 Region:

Parent ID: 9998 Path: Naccarali

Referral ID: Referring Individual: Referral Terms:

FIG. 16 Address Information

Indv ID Full Name

1	Jackie D. Quinn
---	-----------------

Individual ID: Contact Type: Accounts Payable

Full Name: Title:

First Name: Last Name: Salutation:

Phone: Business Ext:

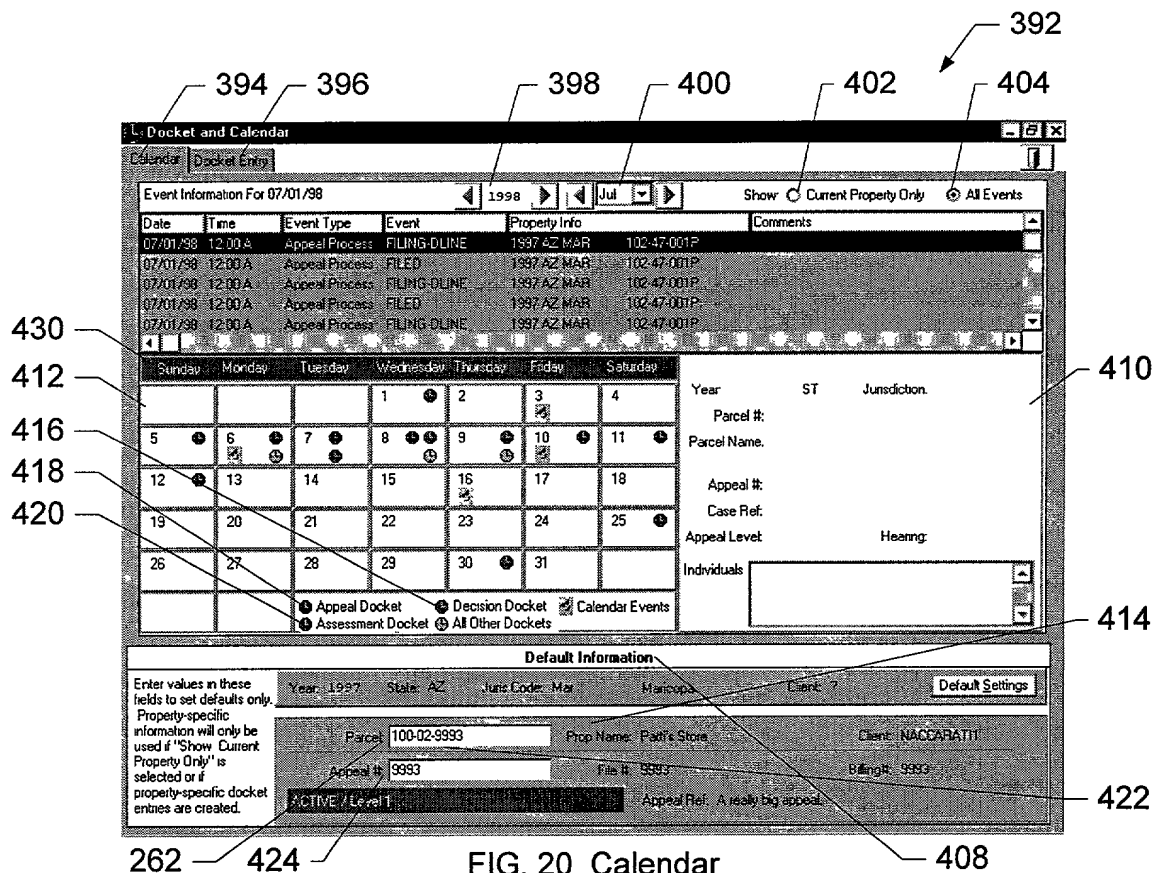
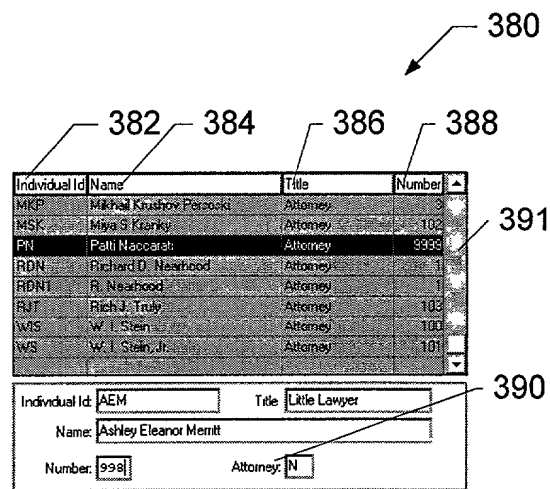
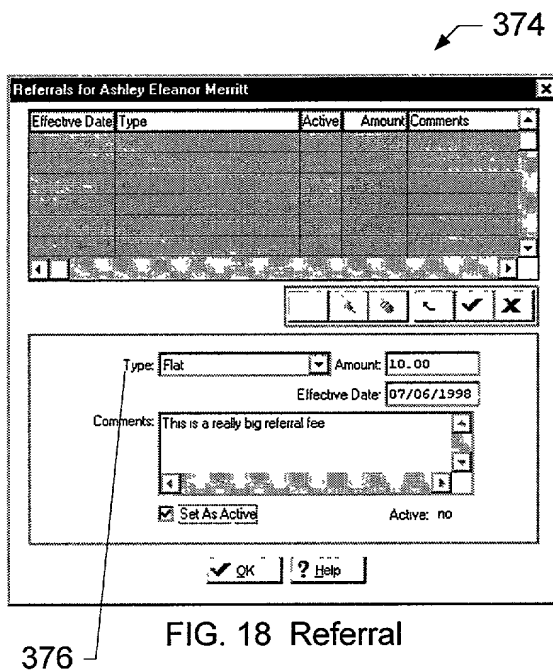
☐ Address is Same as Client

Address 1: Address 2: Address 3:

City: State: ZIP:

E-Mail:

FIG. 17 Contacts



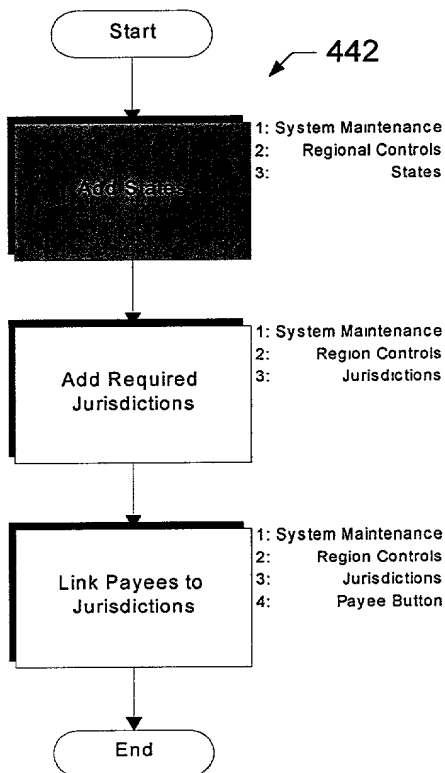
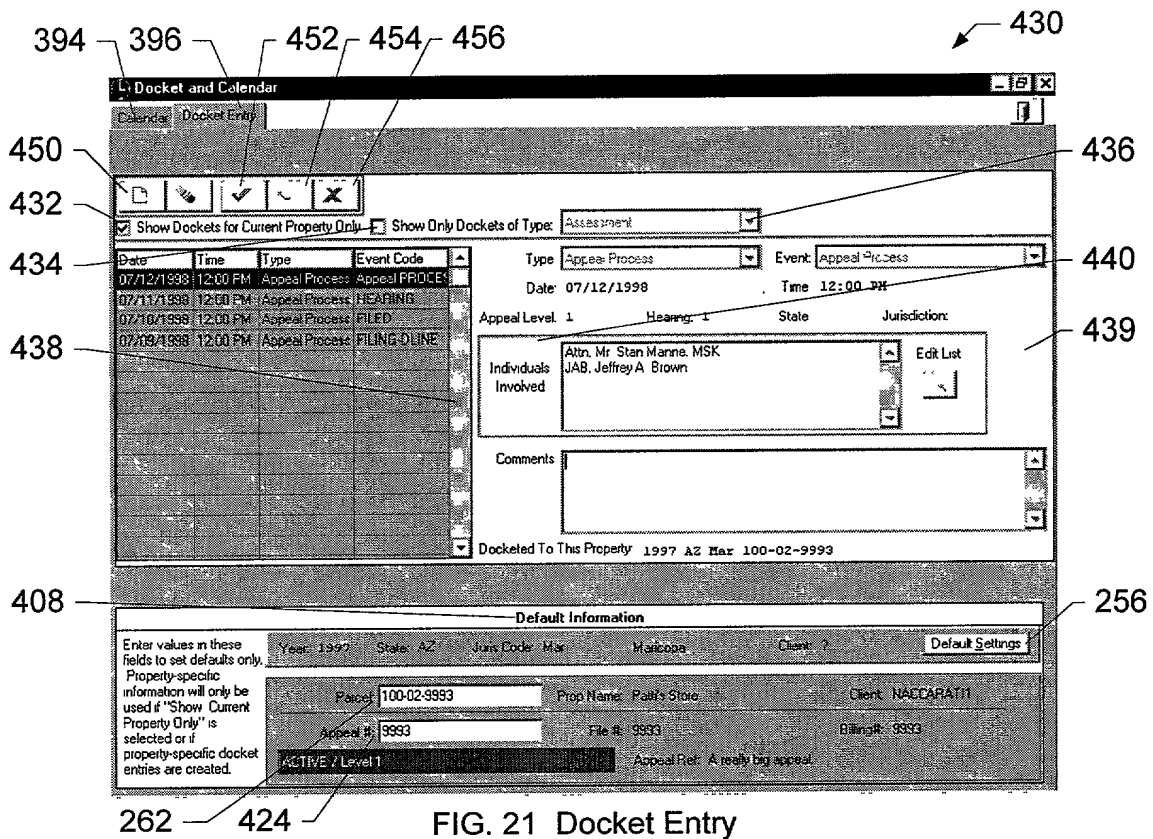


FIG. 22 Creating States and Jurisdictions

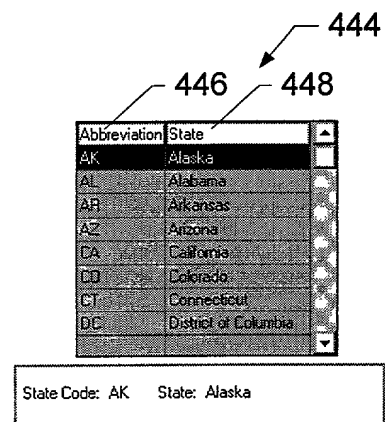


FIG. 23 State Set Up

406

458

234

Jurisdiction Maintenance

Other Exit Navigation Save

1. Select a state

460

464

2. Select a jurisdiction

Abbreviation	State
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia

Juris Code	Juris Name	Rate Year	Parent Jurisdiction
APA	Apache	1995	
COC	Coconino	1995	
COCHISE	Cochise	1995	
GIL	Gila	1995	
GRA	Graham	1995	
GRF	Greenlee	1995	

Sub-Jurisdictions:

Juns Code	Juris Name

466

470

472

473

474

State: AZ

Rate Year: 0

Parent Juris Code:

Juris Cd:

Juris Name:

Parcel Format:

Default Payee ID: 2

465

468

494

Payees

Show Parents Jurisdictions Only

Show Territories

FIG. 24 Jurisdiction Set Up

486

406

452

456

476

482

490

478

480

492

Payees for MAR/AZ

Payee ID: ☐ Set As Default

Payee ID	Name	Default
MCT	Maricopa County Tax Collector	Y

Payee Detail

Client ID	Client Name	Client #	Billing #
MCT	Maricopa County Tax Collector	MCT	MCT

Type: Collector SubType: [None] Responsible Individual: [None]

Address: 121 W. Jefferson

Mailing Address:

City: Phoenix State: AZ Zip: 85001

E-Mail Address: taxcollector@maricopacounty.com

Phone: 602-565-0000 Extension: 2

Fax: 602-565-0001 Region: Active: Y

Parent ID: Referral ID: ? Referring Individual:

Notes:

Contact

Referral Term

FIG. 25 Jurisdiction Payee

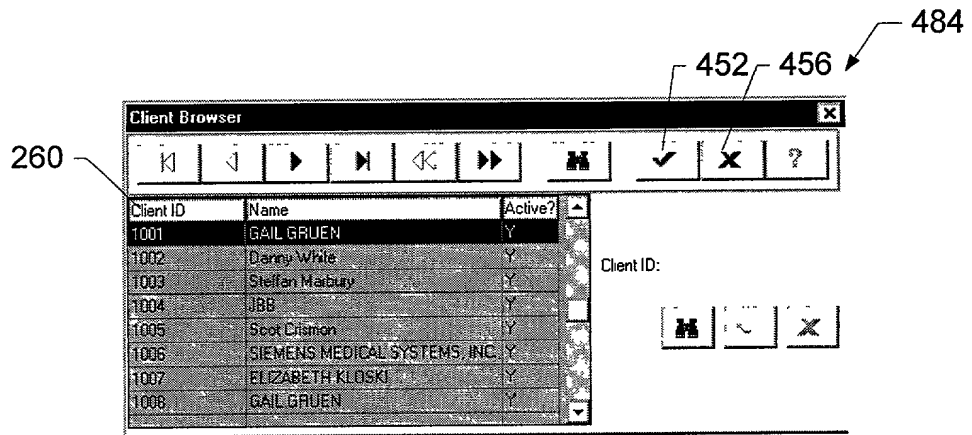


FIG. 26 Client Browser

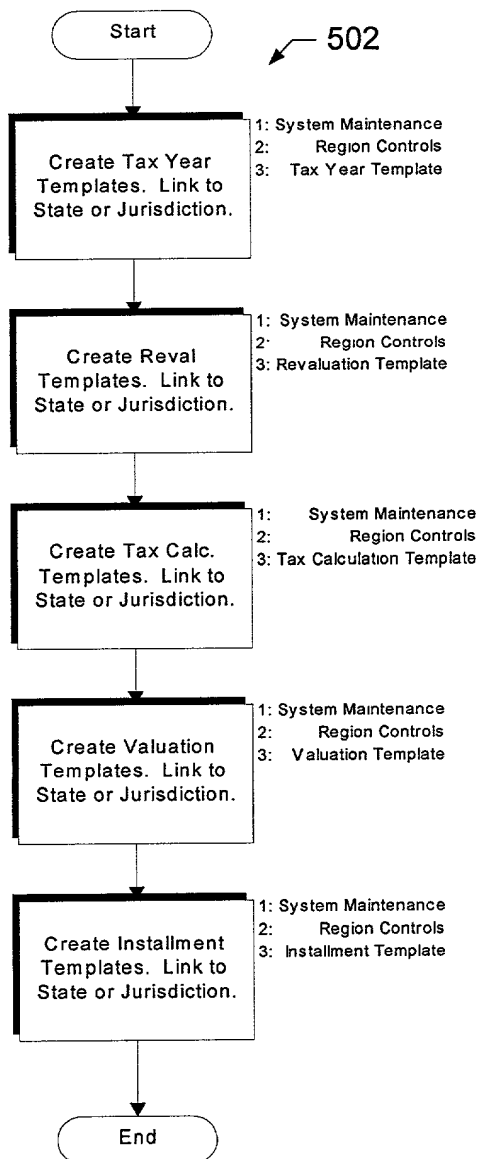


FIG. 27 Templates

FIG. 28 - TAX YEAR TEMPLATE

FIG. 29 Tax Year Template Link To

Tracks	Template Description	Template Name
All	Tax Calculation	Arizona Do Not Modify
All	Valuation Control	Arizona Do Not Modify
All	Appeal Control	Arizona Do Not Modify
REAL	Installment Rules	Arizona
PERPF	Installment Rules	Arizona
SUP	Installment Rules	Arizona
NAV	Installment Rules	Arizona
All	Dynamic Labels	Arizona Do Not Modify
All	Tax Year Dates	Arizona

FIG. 30 Templates by Year

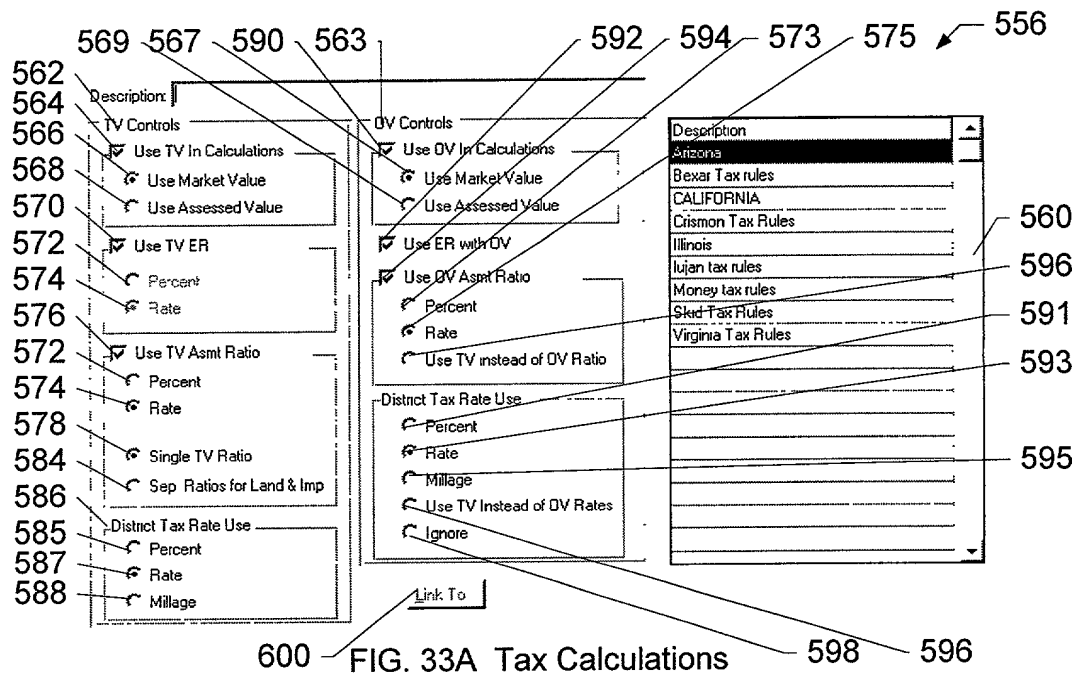


FIG. 33A Tax Calculations

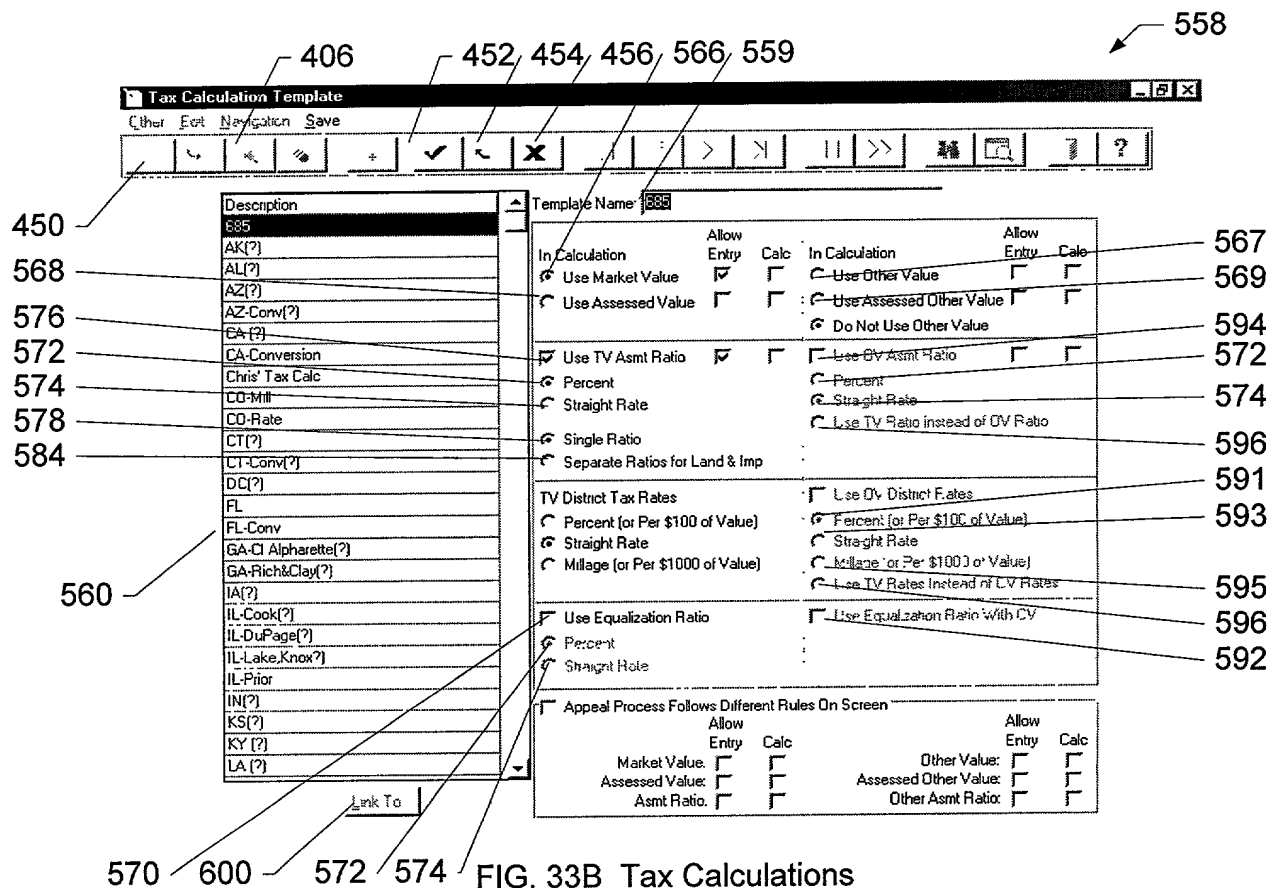


FIG. 33B Tax Calculations

Arizona

Template Name Arizona

Show:

Link Type	Start Year	End Year	State	Jurisdiction Code
STATE	0000	9999	AZ	

Jurisdiction State System Default

Start Year 0000 End Year 9999

State Juris Cdt

Status
Link 'Arizona' to , up until present.

FIG. 34 Tax Calculation Link To

Installment Template

Template Name CT Installment Template

System Default Texas Do Not Modify

Link To

Installment Rule Description

1. (Current Year Tax / Current Year # Installments) * 3.00

2. (Current Year Tax / Current Year # Installments) * 10.00

Installment: 3

Standard Rules (Current Year Tax divided by Current Year # Installments)

Advanced Rules

(Current Year Tax / Current Year # Installments) * Supplemental Type Supplemental Value

(Current Year Tax / Current Year # Installments) * Supplemental Type Supplemental Value

Discount Date

Month Day

Year

Two Years Prior

Previous Year

Current Year

Next Year

Two Years From

If day falls on holiday or weekend then move the day to the:

Prior Workday

Next Workday

Discount % 0.0000

Installment Date

Month Day

Year

Two Years Prior

Previous Year

Current Year

Next Year

Two Years From

If day falls on holiday or weekend then move the day to the:

Prior Workday

Next Workday

Copy Installments

FIG. 35 Installment Template

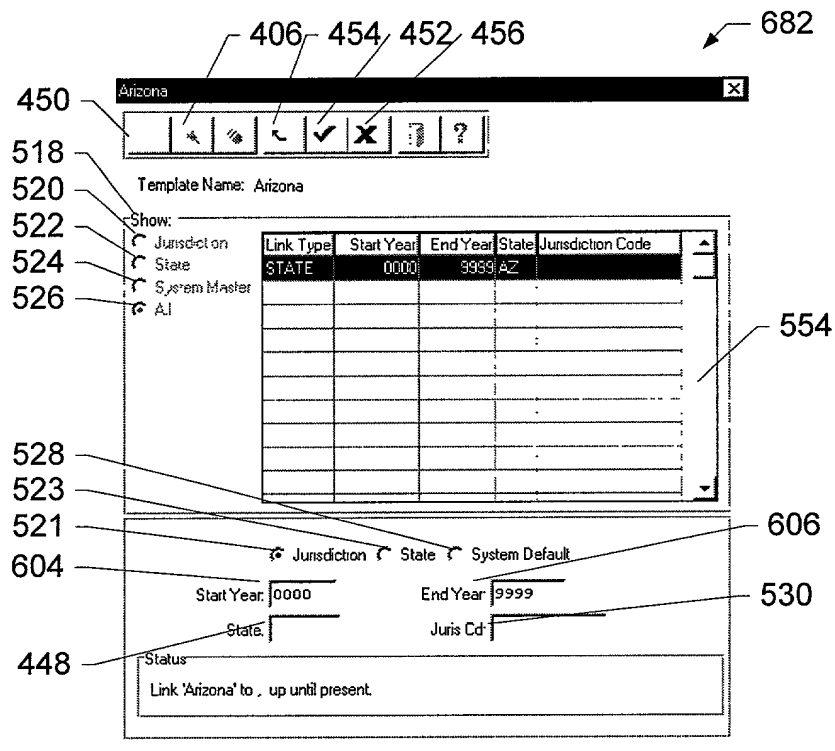


FIG. 36 Installment Templates Link To

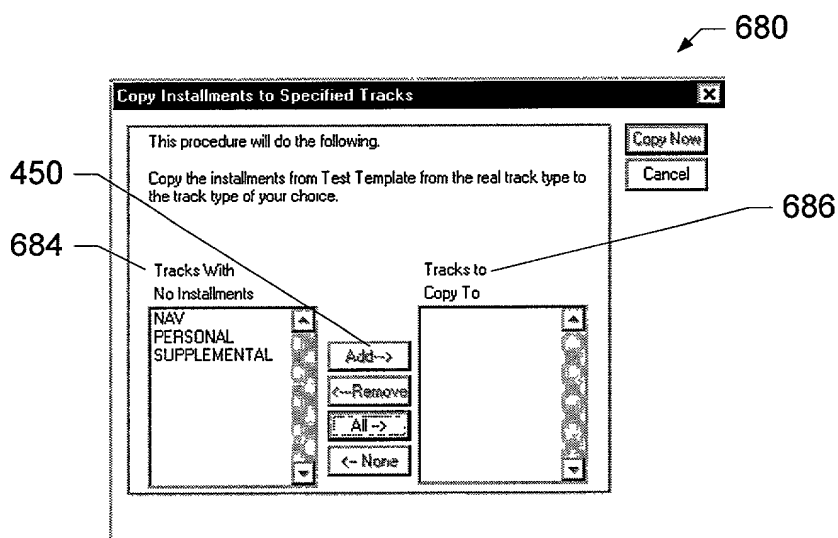


FIG. 37 Copy Installments Dialog Box

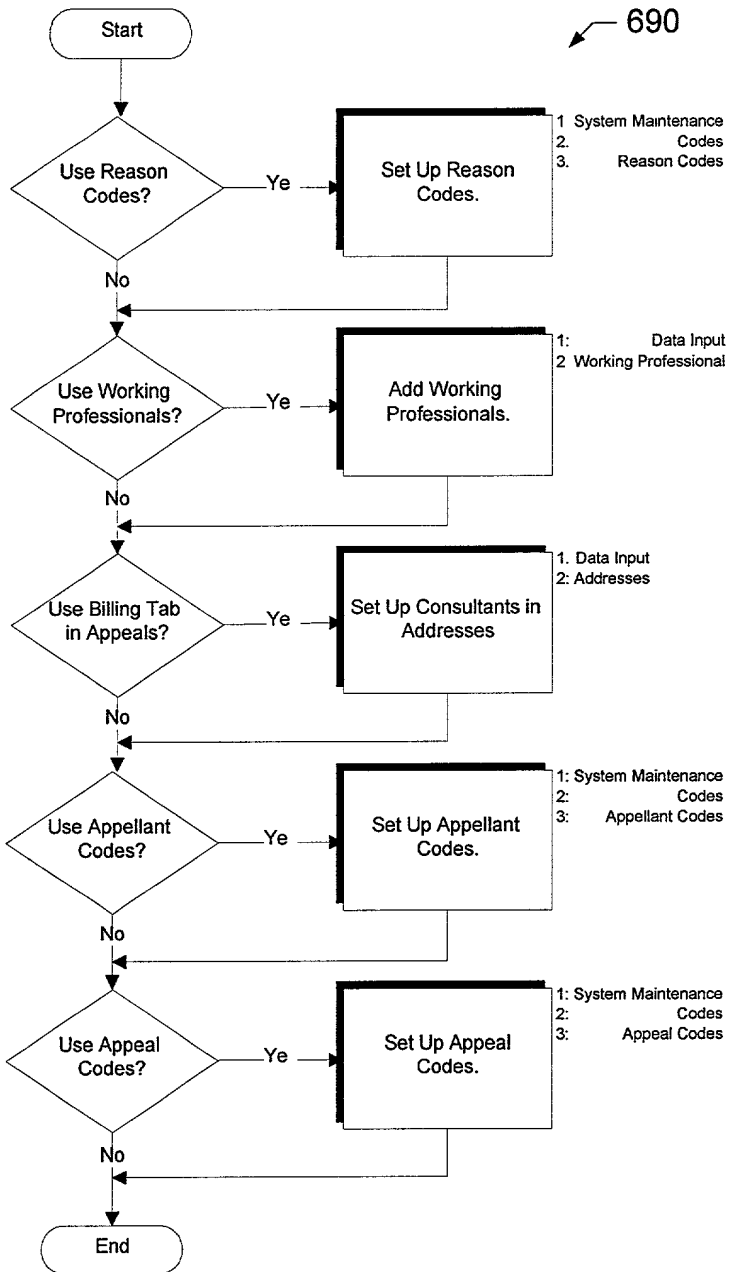


FIG. 38 Appeals Set Up

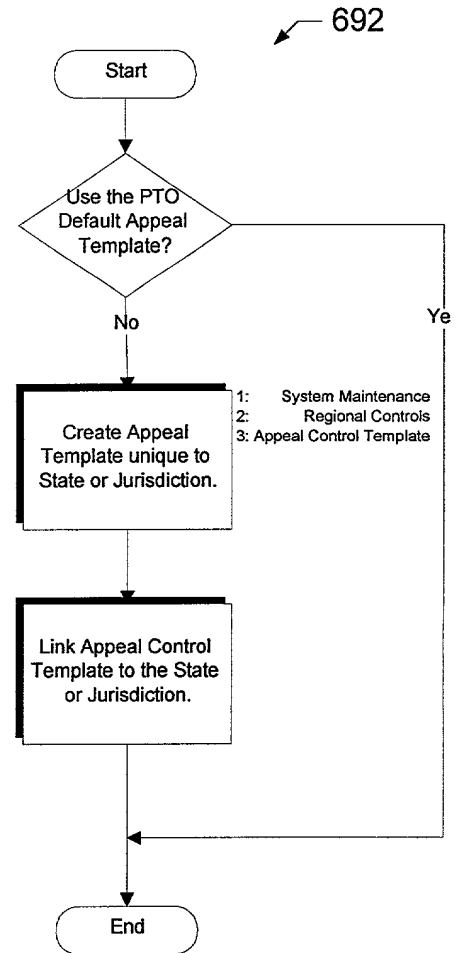


FIG. 39 Appeal Control

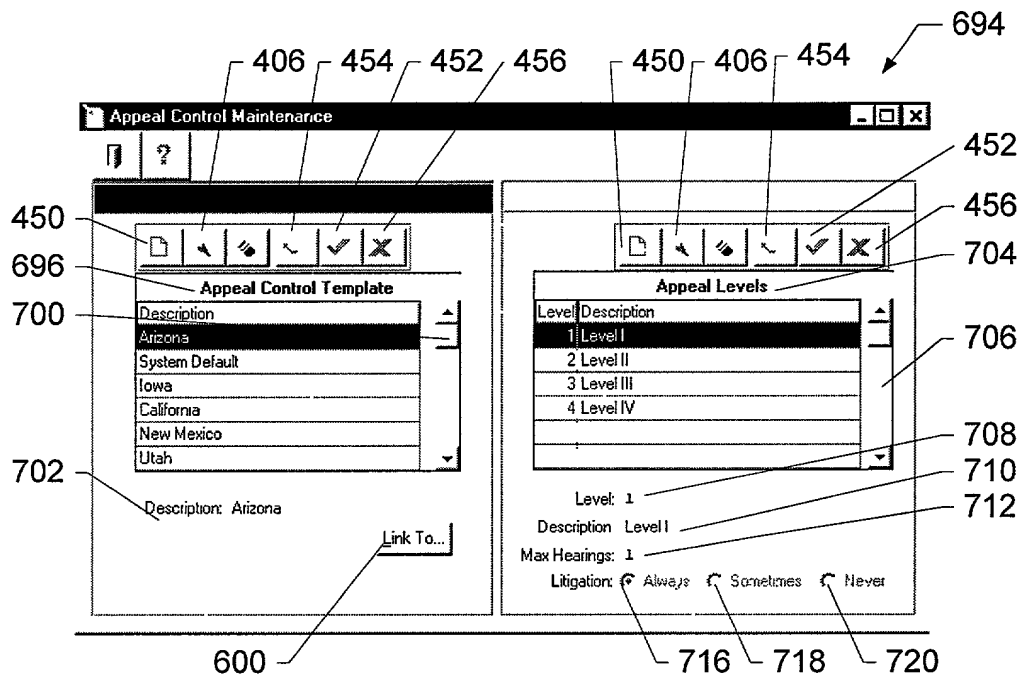


FIG. 40 Appeal Control

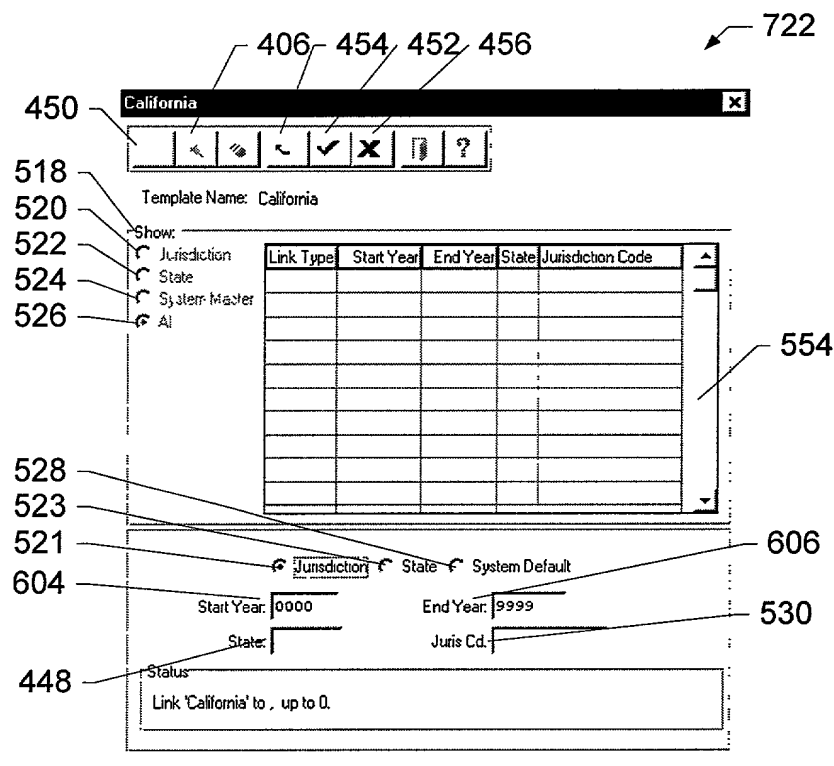


FIG. 41 Appeal Control Link

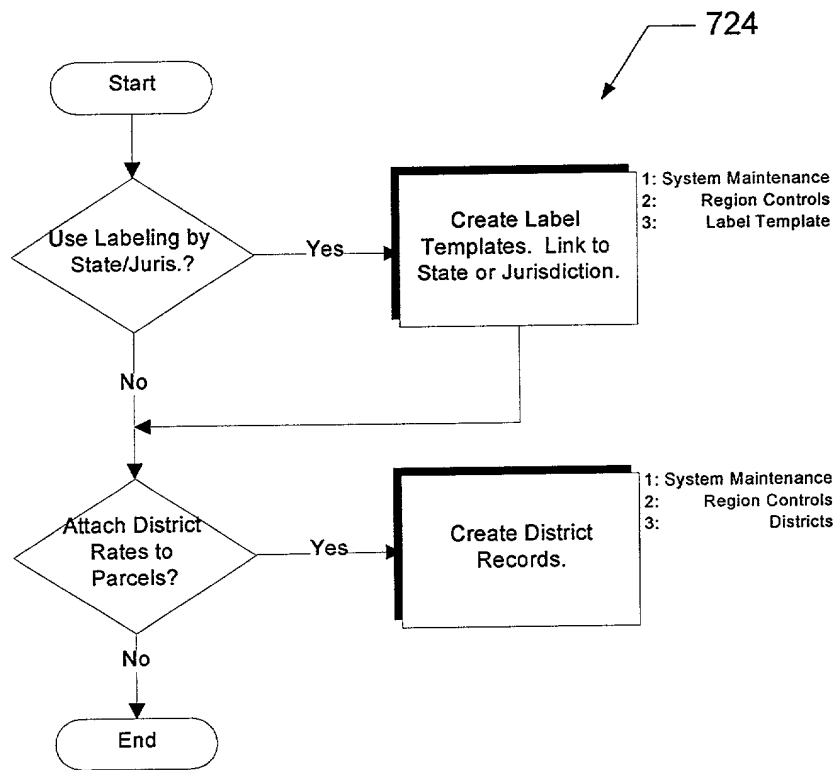


FIG. 42 Dynamic Labeling and Districts

726

730

731

734

732

736

740

728

600

FIG. 43A Label Template

Label Templates		Label List	
Template Name		Label	New Label
Master		Asd OV	Asd OV
FL		Asd TV	AV
AZ		Asd TV Imp	AV Imp
CA		Asd TV Land	AV Land
Crimson Labels		Asd TV Imp	AV Imp
money labels		Asd TV Land	AV Land
		Decision OV Ratio	Decision OV Ratio
		Decision OV Ratio	Decision OV Ratio
		OV	OV
		OV Dst Tax Rate Use	OV Dst Tax Rate Use
		OV Dst Tax Rate Use	OV Dst Tax Rate Use
		OV ER Treatment	OV Eq Mult
		OV ER Tmnt	OV Eq Mult
		OV Increase	OV Increase

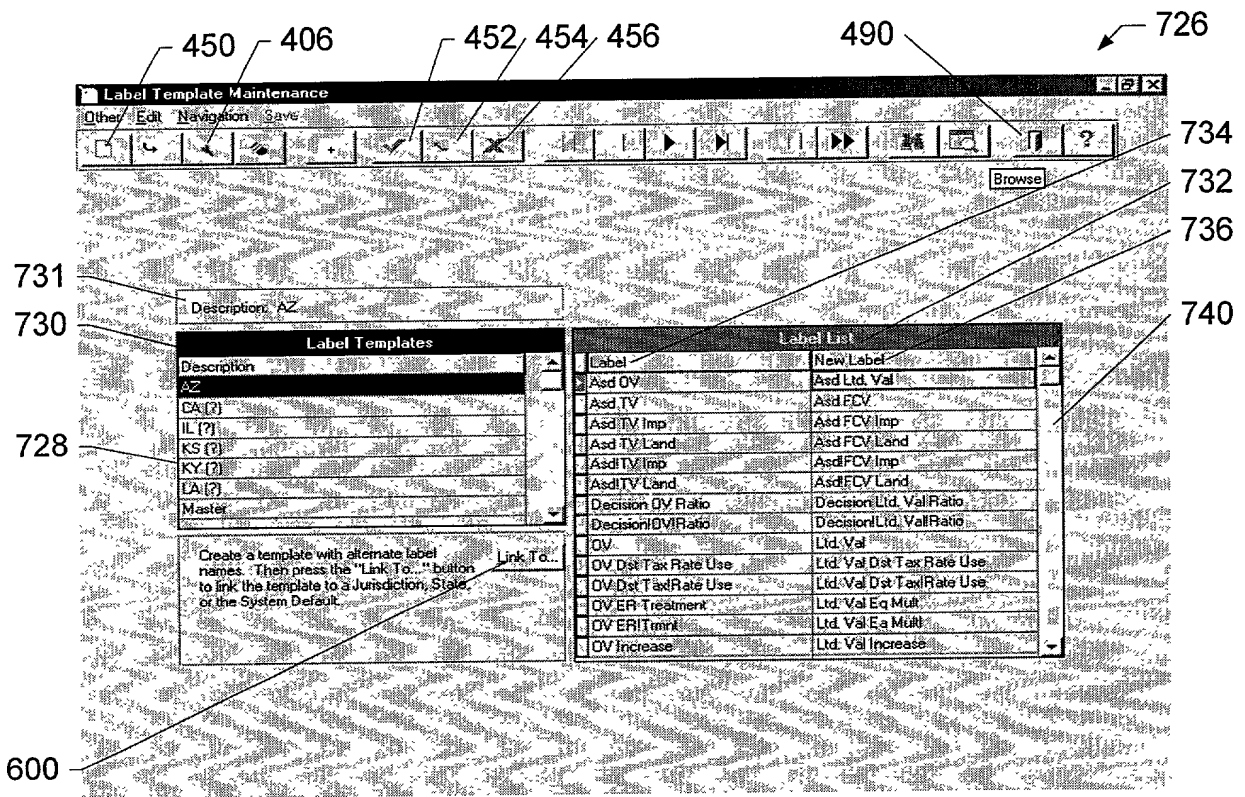


FIG. 43B Label Template

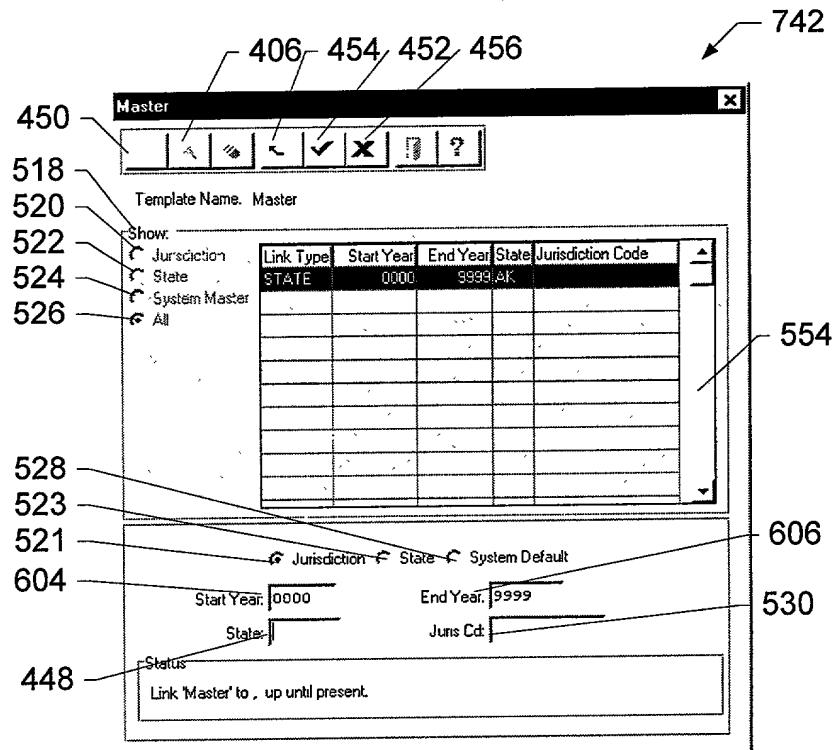


FIG. 44 Label Template Link To

744

Dist Code	Classification	TV Rate	DV Rate
011300	5	0.049993	0.131873
011301	5	0.049993	0.131873
011303	7	0.049993	0.131873
021300	5	0.033276	0.095237
031300	5	0.037463	0.105936
031600	8	0.037028	0.102171
031602		0.037028	0.102171
051300		0.047124	0.143199
061300		0.038875	0.097567

762

456

454

746

Dist Code: Class: [Add] [Edit] [Delete]

748

Dist Code: [] Description: []

750

Class: []

756

TV Rate: [0.000000]

752

DV Rate: [0.000000]

758

☐ Special District

760

Type: []

754

Use in Update?: ☒

FIG. 45 - District Set Up